

**PERFORMANCE WORK STATEMENT**

**SUPPORT ADMINISTRATIVE SERVICES (SAS)  
FOR THE NATIONAL ENERGY TECHNOLOGY LABORATORY (NETL)  
(DE-RP26-03NT41819)**

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## **1.0 Background/Introduction**

### **1.1 NETL**

NETL is a multi-purpose laboratory, owned and operated by the Department of Energy (DOE). NETL conducts and implements science and technology development programs for DOE in energy and energy-related environmental systems.

NETL is the only national laboratory within the DOE complex that is government-owned and government-operated. NETL employees conduct various functions, including performing in-house research and development (R&D) activities, overseeing and directing program funds through NETL's product management organization, defining and implementing contracted R&D efforts through NETL's project and procurement operations, performing policy analysis, and establishing partnerships through licensing and Cooperative Research and Development Agreement (CRADA) activities. The nearly 1,300 research, development, and demonstration projects in NETL's portfolio are conducted in partnership with industry, universities, other national and Federal laboratories, private research organizations, and other Federal and State agencies. NETL's hallmark is the ability to assemble industrial, academic, and governmental resources to create commercially viable solutions to energy and environmental problems.

### **1.2 NETL's Mission**

NETL's primary mission is conducting and implementing science and technology programs to resolve the environmental, supply, and reliability constraints of producing and using fossil resources. NETL does this through its work for DOE's Office of Fossil Energy (FE). NETL is responsible for implementing coal, oil, and gas programs for FE. NETL also has the responsibility for implementing other DOE, governmental, and international programs and projects performed at locations and facilities either managed by NETL or at sites managed by others. To fully support NETL's responsibilities, the services provided by this contract will cover a broad range of energy-related areas, including fuel extraction, fuel transportation, fuel and energy conversion, energy distribution, energy use, energy conservation, and energy infrastructure. Additional information on NETL's organization, mission, and R&D programs can be found at [www.netl.doe.gov](http://www.netl.doe.gov).

### **1.3 Contract Purpose**

The purpose of this contract is to provide administrative program support services to NETL. The support shall be provided to span both the Morgantown, West Virginia (MGN) and Pittsburgh, Pennsylvania (PGH) facilities, except where noted.

## **2.0 Scope**

### **2.1 Types of Services**

The contractor shall provide the following types of services under this contract:

- Management Systems Support Services

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- Administrative Support Services
- Conference Support Services
- Records Management Support Services
- Communication Support Services
- Library Support Services

## **2.2 Resources**

### **2.2.1 Contractor-Furnished Resources**

The contractor shall furnish all personnel, facilities, equipment, materials, and supplies necessary to perform the work under this contract, except for that specifically identified as being provided by the government in Section 2.2.2.

### **2.2.2 Government-Furnished Resources**

The resources to be furnished by the government for use in accomplishing the work under this contract are identified in Part I, Section J, Attachment D, and are governed by Part I, Section H of this contract.

## **2.3 Location of Performance**

The primary locations for the performance of work under this contract shall be at the NETL MGN and PGH sites.

Some travel between NETL sites, and between NETL and other sites in the DOE complex may be required of contractor employees.

## **2.4 Core/Variable Work**

SAS tasks will consist of either core work or variable work. These types of work will differ by their required duration, their resource commitment/location, or their frequency.

### **2.4.1 Core Work**

Core work consists of predictable, longer tasks or tasks that are ongoing or frequently conducted. Core work will be conducted primarily using personnel located on-site at the NETL MGN or PGH facilities. Tasks in the SAS contract will consist primarily of core work.

### **2.4.2 Variable Work**

Variable work consists of shorter, smaller, emergent tasks, and may, subject to Contracting Officer approval, be conducted by off-site contractor personnel.

## **3.0 Applicable Documents**

The following documents, which are referenced in this SOW, can be found in the NETL electronic reading room ([www.netl.doe.gov/business/solicit/ssc2003/index.html](http://www.netl.doe.gov/business/solicit/ssc2003/index.html)).

- 4.1.2 Sub-Service Area – Financial Management: DOE Accounting Handbook; ASAP (Automated

- Standard Application for Payments) Federal Agencies User Guide; Federal Travel Regulations
- 4.2.1 Sub-Service Area – Clerical Support: NETL Correspondence Guidelines; NETL P243.2.1 Records Management Procedure
- 4.4 Service Area – Records Management Support Services: NETL O243.2 Records Management Program; NETL P243.1-1 ES&H (Environment, Safety, and Health) Record Identification and Retention

#### **4.0 Service Areas/Performance Requirements/Necessary Conditions**

##### **4.0.1 Service Areas**

The requirements in this statement of work are grouped under service areas.

##### **4.0.2 Performance Requirements**

Performance requirements of this contract are expressed in the following manner:

Each performance requirement will contain the following elements. In each case, when taken together, these elements constitute a performance requirement.

- a. Performance Objective. A statement of the outcome or results expected in a specific service area. These objectives are identified in the basic contract for each service area. Performance objectives are also found in the task orders issued under each of the service areas.
- b. Performance Measures. The critical few characteristics or aspects of achieving the objective that will be monitored by the government. Each objective may have one or more measures. The performance measures for each service area can be found in Part III, Section J, Attachment F, Performance Evaluation Plan. The performance measures fall into four major categories:
  - Quality of Work Product: The percent of time the work product, work deliverable, etc., is accepted (upon receipt) or acceptable (upon inspection) by the government without revision, correction, or error (note: revisions, corrections, or errors refer to those due to non-performance on the part of the contractor).
  - Quality of Execution of Work Processes: The percent of time work processes are successfully executed by the contractor without valid customer complaint and/or intervention by the government for re-direction (due to non-performance on the part of the contractor).
  - Timeliness: The percent of work deliverables, work products, and work processes that are successfully executed according to established schedules (e.g., target dates) or work timeline expectations (e.g., expected amount of time for executing recurring work).
  - Cost Control: The percent deviation of actual costs versus planned costs.
- c. Performance Expectations. The targeted level or range of levels of performance for each performance measure. Performance expectations are identified for the measures in Part III, Section J, Attachment F, Performance Evaluation Plan.

##### **4.0.3 Necessary Conditions**

Some requirements are supplemental to or supportive of the accomplishment of the performance requirements. These requirements are identified as Necessary Conditions. These conditions, while they

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may not be accompanied by measures and expectations, will be a factor in the computation of the contractor award fee. Completeness of execution will be the primary factor evaluated.

#### **4.1 Service Area – Management Systems Support Services**

The contractor shall:

- a. Operate, maintain, input data into, and report from the various information systems in support of NETL's Acquisition and Assistance Division (AAD), the Financial Management Division (FMD), and the Human Resources Division (HRD).
- b. Provide a broad spectrum of management and administrative support to AAD, FMD, and HRD. The support shall include, but not be limited to, the following:
  - Documentation and records maintenance support.
  - Unsolicited proposal (USP) support.
  - Procurement and assistance data system support.
  - Administrative support for simplified acquisitions.
  - Invoice processing for payment.
  - Closeout function support.

##### **4.1.1 Sub-Service Area - Acquisition Support**

Performance Objective No. 4.1.1. The contractor shall provide support to NETL AAD. This support shall include, but not be limited to, the following:

- a. Operate and maintain various AAD information/operations systems.
- b. Collect, process, enter, and validate data for these systems and any subsequently developed systems. Systems requiring support may include, but not be limited to, the following:
  - Award Close Out System
  - Contract Writing System
  - Electronic Commerce Web-based System
  - Federal Information Tracking System (FITS)
  - Small Purchase System
  - Subcontract Reporting System
  - Unsolicited Proposal Tracking System
  - Procurement Action Tracking System (PATS)
  - Procurement Automated Data System (PADS-Web)
  - Procurement Request Authorization and Tracking System (PRATS)
  - Invoice Tracking System
- c. Receive and distribute all incoming and outgoing correspondence and contractual documents, and maintain administrative control of the flow of documents internal and external to AAD (PGH).
- d. Receive, distribute, and maintain copies of updates to Federal Acquisition Regulations, DOE Acquisition Regulations, DOE Acquisition Letters, DOE Financial Assistance Letters, Acquisition and Financial Assistance Guides, special distributions; and maintain distribution lists for policy correspondence.
- e. Distribute, photocopy, and mail documents relating to solicitations, grants, contracts, cooperative

agreements, interagency agreements, modifications, and simplified acquisition documents (PGH).

- f. Provide closeout support, including activities such as receiving, sorting, and processing contractor/grantee vouchers submitted to the NETL for payment; verifying funds availability, current completion date, and that vouchers do not exceed obligated amounts; and providing routine and ad hoc closeout reports.
- g. Provide support for the PRATS, PATS, and PADS-Web. Support will include, but not be limited to: operating and maintaining support for PRATS, PATS, and PADS; responding to requests for information from the tracking systems and maintaining all related files; providing data collection and data input from the Procurement Request and Individual Procurement Action Report into the system and validating entry after input; generating standard reports, and generating and maintaining statistical procurement graphs and annual view graph requirements; acting as the liaison with DOE Headquarters for PRATS/PATS/PADS-Web assistance; serving as the focal point for inquiries related to the completion of required PRATS/PATS/PADS documents; providing ad hoc reports; satisfying quarterly, semi-annual and annual reporting requirements to Headquarters (including the Contract Under Twenty-five Thousand System); and obtaining on-line credit reports from Dun & Bradstreet.
- h. Provide USP administrative support to the DOE Unsolicited Proposals Manager. This includes, but is not limited to, providing support for the weekly USP status log, pre-evaluation log, award acceptance memos, follow-up of delinquent USP actions, maintenance of USP documentation files, response to USP information/status inquiries, and other administrative reporting as required.
- i. Provide FITS support including the input, operation, and maintenance of FITS to facilitate tracking, status, and control in distribution of AAD contractual deliverable documents; initiating system-generated letters; receiving and distributing reports submitted by awardees; and preparing and distributing ad hoc reports.
- j. Maintain files and reference materials in AAD file room, closeout room, and procurement library (including contractor/vendor/General Services Administration catalog files), and dispose of records. Elimination of filing errors is a primary concern in this area (PGH).

Necessary Condition No. 4.1.1.1. The contractor shall prepare FedEx mail forms, letters, memorandums, and labels.

Necessary Condition No. 4.1.1.2. The contractor shall maintain the AAD supply closet.

Necessary Condition No. 4.1.1.3. The contractor shall create report/invoice/modification backup files and subcontract files for new awards (PGH), maintaining current and previous year files; maintain current and previous year letter files, award letter files, current and previous years weekly reports; and maintain files for contractual instruments (including closeout).

#### **4.1.2 Sub-Service Area – *Financial Management Support***

The contractor shall provide support to NETL's FMD. The support shall include, but not be limited to, the following:

- a. Operate and maintain various FMD information/operations systems.

- b. Collect, process, enter, and validate data for these systems and any subsequently developed systems. Systems requiring support may include, but not be limited to, the following:
- Fossil Energy Business Management Information System (BMIS)
  - Departmental Integrated Standardized Core Accounting System (DISCAS)
  - Travel Manager

Performance Objective No. 4.1.2.1. The contractor shall provide support for DISCAS (and potential follow-on systems) including, but not limited to, the following:

- a. Record transactions (e.g., obligations, payroll, cost, etc.) for contracts, interagency agreements, financial assistance awards, and other documents for NETL and the Albany Research Center (ARC) from supporting documents (e.g., award document, cost management report, financial status report, etc.) and following the requirements of the DOE Accounting Handbook.
- b. Coordinate, through the Oak Ridge Financial Service Center (ORFSC), invoice payments for obligation instruments for which the contractor is the approving official; and provide support to ORFSC in obtaining certain invoice approvals for obligation instruments for which the contractor is not the approving official.
- c. Record the receipt of checks in the check log and prepare all checks received for deposit to the Federal Reserve Bank.
- d. Enter manual or automated entries into the Treasury ASAP system following the requirements of the ASAP Federal Agencies Users Guide.
- e. Maintain the DISCAS Obligation Reference data-set (e.g., Prompt Payment Act coding, etc.).
- f. Maintain FMD-related files for contracts, financial assistance awards, small purchases, and miscellaneous documents.

Necessary Condition 4.1.2.1.a. The contractor shall review and reconcile financial management reports.

Performance Objective 4.1.2.2. The contractor shall provide support for BMIS (and potential follow-on systems) and the NETL Budget Directive System, including, but not limited to, the following:

- a. Collect, review for accuracy, and enter data into BMIS, and update BMIS for activities/projects/programs throughout their life cycle (e.g., program execution plans, carryover, obligations, de-obligations, etc).
- b. Periodically reconcile the BMIS database to include end of fiscal year reconciliation of funding and obligations.
- c. Assist in the monitoring and maintenance of the NETL Budget Directive System.

Necessary Condition No. 4.1.2.2.a. The contractor shall assist in BMIS training.

Necessary Condition No. 4.1.2.2.b. The contractor shall assist in the design or enhancement of the new



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BMIS, or other potential follow-on systems.

Necessary Condition No. 4.1.2.2.c. The contractor shall generate and distribute BMIS reports.

Performance Objective No. 4.1.2.3. The contractor shall provide travel support, including, but not limited to, the following:

- a. Provide travel management support services by coordinating travel arrangements for all government- and non-government-authorized travelers for NETL and ARC following federal travel regulations.
- b. Assist in managing or manage (if required) the Travel Manager database, utilize Travel Manager software, and assist travelers in utilization of the Travel Manager software.
- c. Perform manual and automated entries to DISCAS and other systems, logging travel-related documents such as vouchers, itineraries, authorizations, airline tickets, and reimbursements.
- d. Prepare travel authorizations as required by the government; validate travel arrangements; and distribute tickets/travel information and travel delinquency notices.
- e. Review travel authorizations and assist with other financial services such as data entry, data collection, preparation of financial reports, and delinquency statements.

Necessary Condition 4.1.2.3.a. The contractor shall maintain travel-related files and forms (foreign travel authorizations, travel vouchers, local travel claims, miscellaneous claims, TMC reports, etc.) for NETL and ARC.

#### **4.1.3 Sub-Service Area – *Human Resources Support***

Performance Objective No. 4.1.3. The contractor shall provide support to NETL's HRD to include, but not be limited to, the following:

- a. Perform NETL employee training data entry support to the Corporate Human Resources Information System (CHRIS) database.
- b. Provide support to the training office to include daily updating of spreadsheets for tracking purposes (payment, evaluations, completion of training, college courses, purchase order numbers, and group training).

Necessary Condition No. 4.1.3.1. The contractor shall generate reports from CHRIS for employee training histories and ad hoc reports as requested by the training coordinator.

#### **4.2 Service Area – *Administrative Support Services***

The contractor shall provide a variety of administrative services supporting NETL's program areas.

##### **4.2.1 Sub-Service Area – *Clerical Support***

Performance Objective No. 4.2.1. The contractor shall provide clerical support services. The clerical

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support shall include, but not be limited to, the following:

- a. Type correspondence (letters, memoranda, and reports) ensuring conformance with the NETL Correspondence Guidelines and using NETL's standard software programs (e.g., MS Word and Excel).
- b. Assist in preparation of travel vouchers, reports, and other travel documents.
- c. Answer telephones and refer callers to appropriate personnel.
- d. Greet visitors and escort them to the appropriate offices or arrange for the responsible NETL employee(s) to meet them.
- e. Prepare presentation materials using NETL standard presentation mediums.
- f. Establish and maintain government files in accordance with NETL Procedure 243.2.1 Records Management.
- g. Coordinate logistics (such as scheduling) for meetings, events, and inspections.

Necessary Condition No. 4.2.1.1. The contractor shall distribute incoming mail to appropriate personnel.

Necessary Condition No. 4.2.1.2. The contractor shall copy and distribute correspondence, reports, and other documents.

Necessary Condition No. 4.2.1.3. The contractor shall send, receive, and deliver faxes.

Necessary Condition No. 4.2.1.4. The contractor shall prepare purchase and storeroom requisitions and ensure that items are received and distributed.

Necessary Condition No. 4.2.1.5. The contractor shall collect data for use in various documents.

Necessary Condition No. 4.2.1.6. The contractor shall utilize and maintain databases and information systems.

Necessary Condition No. 4.2.1.7. The contractor shall deliver concurrence packages and other items between buildings and offices on site as needed.

Necessary Condition No. 4.2.1.8. The contractor shall provide stenography services to the NETL as necessary.

#### **4.2.2 Service Area – *Receptionist Support***

Performance Objective No. 4.2.2. The contractor shall maintain reception areas at NETL's sites. This function shall include, but not be limited to, the following:

- a. Answer and transfer telephone calls and take messages.

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- b. Maintain and replenish display of brochures, maps, directions, and other printed informational materials.
- c. Send and receive items from van shuttle driver and ensure timely receipt by appropriate offices.
- d. Confirm conference room reservations and resolve scheduling conflicts.

Necessary Condition No. 4.2.2.1. The contractor shall provide clerical support (general typing, copying, faxing, relaying messages) for those using lobby area and conference rooms.

Necessary Condition No. 4.2.2.2. The contractor shall issue employee parking permits for off-site parking.

Necessary Condition No. 4.2.2.3. The contractor shall distribute and account for safety equipment (lab coats, safety glasses, and hard hats) for visitors' use.

Necessary Condition No. 4.2.2.4. The contractor shall manage and maintain lobby area including conference room and directory marquees.

#### **4.2.3 Sub-Service Area – *Word Processing Support***

Performance Objective No. 4.2.3. The contractor shall provide word processing support functions. This support shall include, but not be limited to, the following:

- a. Type and convert documents from handwritten, electronic, or recorded sources, and scan documents from paper to electronic form. Documents may include tables, graphs, and view graphs.
- b. Produce technical reports.
- c. Maintain various databases and develop new databases as requested.
- d. Prepare and convert documents for multimedia publication.
- e. Provide desktop publishing services including production of the monthly NETL newsletter.

#### **4.2.4 Sub-Service Area – *Forms Management Support***

Performance Objective No. 4.2.4. The contractor shall provide support for the NETL Forms Management Program. The support shall include, but not be limited to, the following:

- a. Establish and maintain an up-to-date electronic record of all electronic and paper-based forms including the salient attributes associated with the forms.
- b. Design/redesign NETL forms in standard format, as requested by the NETL Forms Manager, and maintain a current electronic inventory on the Local Area Network (LAN).
- c. Maintain a complete electronic inventory of all stock (NETL and departmental forms stock and other miscellaneous items such as envelopes, letterhead, memorandum, and conference notepads).

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- d. Maintain and fill all requests for stockroom forms and controlled departmental forms.
- e. Maintain one physical stock record of the most up-to-date revisions for all forms and miscellaneous items ordered and used by NETL personnel.
- f. Replenish and order stock (which may include providing appropriate backup materials such as negatives, camera copy, and samples) of DOE, standard, optional, and other agency forms, envelopes, letterhead, NETL multiple-set forms and other miscellaneous items ordered from the Government Printing Office (GPO), as necessary, in order that an adequate supply is available for NETL personnel.
- g. Prepare documentation and files required for submission to GPO.
- h. Submit monthly reports regarding the status of all forms work including, but not limited to, total number of forms, change requests, number completed, number changed, and work in progress.

Necessary Condition No. 4.2.4.1. The contractor shall maintain an historical archive of the two prior versions for all electronic and paper-based forms.

Necessary Condition No. 4.2.4.2. The contractor shall copy final forms revisions to the LAN after approval by the NETL Forms Manager. NETL form numbering shall be coordinated with the NETL directives point of contact (POC).

Necessary Condition No. 4.2.4.3. The contractor shall provide for the orderly storage, inventory, ordering, and distribution of hard copy forms for each of the various groups of forms.

Necessary Condition No. 4.2.4.4. The contractor shall operate a forms management system in support of the Forms Management service area. This may include, but is not limited to, forms development software, spreadsheets, and forms management systems.

#### **4.2.5 Sub-Service Area – *Copy Center and Reproduction Machine Maintenance Support***

Performance Objective No. 4.2.5. The contractor shall operate the NETL copy center at the PGH site. The support shall include, but is not limited to, the following:

- a. Provide high-quality reproduction services on a demand basis, which includes the binding of documents from both electronic and hard copy originals.
- b. Provide management services for reproduction machines, including the convenience copiers, including:
  - Provide acquisition recommendations, management of copier subcontracts (which may be required), maintenance, and monitoring of the equipment necessary to fulfill NETL's duplicating service requirements.
  - Provide assistance to users of self-serve copy machines, key operator maintenance of self-serve copiers, and troubleshooting of self-serve machines. The equipment maintenance and repair service shall include, but not be limited to, the following specific areas: copy quality maintenance, parts replacement, emergency repairs, and preventive maintenance.
  - Designate a primary and alternate individual as a point of contact (POC) for all service requests

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- relating to the equipment. All service calls for equipment repairs shall be placed by the POC to ensure consistent and concise information regarding the required repairs of equipment. The POC shall coordinate a quarterly review of all equipment and service logs to assess the applicability and performance of each machine in relation to the area the machine supports. Any repairs requiring professional services shall be reported to and approved by the COR.
- Distributing to NETL personnel electronic or, as necessary, hard copy versions of government publications including, but not limited to, Congressional Reports and Code of Federal Regulations.

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Necessary Condition No. 4.2.5.1. The contractor shall order and maintain supply levels sufficient to provide uninterrupted reproduction service.

Necessary Condition No. 4.2.5.2. The contractor shall operate and maintain (includes minor repair work) all reproduction equipment in the copy center (e.g., high-speed copiers, digital scanners, binding equipment, stapling and hole punch equipment).

Necessary Condition No. 4.2.5.3. The contractor shall establish and maintain a usage record system of copy center and convenience copier services for the purpose of administrative control and voucher/invoice reconciliation for both the MGN and PGH sites.

Necessary Condition No. 4.2.5.4. The contractor shall deliver completed reproduction jobs to the requestor.

Necessary Condition No. 4.2.5.5. The contractor shall establish and maintain a log of all service calls for each reproduction/copy machine.

#### **4.2.6 Sub-Service Area – *Telefacsimile Support***

Performance Objective No. 4.2.6. The contractor shall provide telefacsimile services at the PGH site. The support shall include, but is not limited to, the following:

- a. Operate telefacsimile equipment.
- b. Send and receive non-sensitive messages and notify recipients of their arrival.

Necessary Condition No. 4.2.6.1. The contractor shall provide these services at a single, central location (i.e., co-located with copy center).

Necessary Condition No. 4.2.6.2: The contractor shall satisfy the following conditions:

- a. Maintain supply levels sufficient to provide uninterrupted telefacsimile service.
- b. Establish and maintain a usage record system for telefacsimiles and appropriate files.
- c. Provide requestors with documentation of receipt and transmittal of faxes.
- d. Establish and maintain a log of faxes sent and received.
- e. Notify telefacsimile recipients on the day of receipt. Urgent faxes are to be transmitted immediately upon receipt.

#### **4.3 Service Area – Conference Support Services**

##### **4.3.1 Sub-Service Area – *Conference Room and Audiovisual Management Support***

Performance Objective No. 4.3.1. The contractor shall schedule and make arrangements for use of the conference rooms at the MGN and PGH facilities. Specific duties include, but are not limited to, the following:

- a. Schedule conference, assembly, and teleconferencing rooms.
- b. Configure conference rooms as specified by users.
- c. For both on-site and off-site meetings, ensure audiovisual equipment required by meeting attendees is in place and that any specific requirements (videotaping, audiotaping) are met.
- d. Coordinate videotaping of conference proceedings.
- e. Schedule and set up video teleconferences and audio (telephone) conferences. This includes set up and operation of teleconferencing equipment, and making arrangements for dial-in audio conference calls.
- f. Provide audiovisual and teleconference logistical support and user assistance.
- g. Maintain all audiovisual and teleconference equipment in good working condition.
- h. Provide specifications for new audiovisual and teleconferencing equipment needs.

#### **4.3.2 Sub-Service Area – *Conference Management Support***

Performance Objective No. 4.3.2. The contractor shall provide conference management support functions for NETL. Functions to be performed shall include, but are not limited to, the following:

- a. Act as liaison with the NETL cafeteria or other caterers for coordination of food service functions associated with NETL conferences, meetings, and special events.
- b. With Contracting Officer approval, enter into contracts with off-site meeting facilities.
- c. Organize and print conference/meeting announcement flyers.
- d. Respond to all telephone inquiries and written correspondence concerning conference/meeting.
- e. Arrange and coordinate hotel accommodations for meals, meeting rooms, and necessary equipment, and meet with hotel staff to review and discuss all aspects of hotel logistics for planned conferences/meetings.
- f. Assemble papers or electronic media to be presented at conferences/meetings, and arrange for the electronic distribution, posting on the intranet, or publishing of the proceedings.
- g. Handle requests for conference proceedings subsequent to the conference/meeting and provide support for the production and distribution of approved NETL CD media including, but not limited to, conference proceedings, energy-related handbooks, and technology overviews.
- h. Submit accounting reports (within 60 days of the completion of the conference/meeting) listing the source of all conference/meeting income, expenses, and distributions of the excess income over expenses (if any).

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- i. Issue a final financial report (within 120 days of conference/meeting) reconciling all bank accounts and any outstanding invoices.



Necessary Condition No. 4.3.2.1. The contractor shall provide input for preliminary budgets for conferences/meetings.

Necessary Condition No. 4.3.2.2. The contractor shall, as directed, publicize conferences and meetings in appropriate technical and professional journals or other media outlets.

Necessary Condition No. 4.3.2.3. The contractor shall develop and maintain listings of potential attendees with mailing addresses and other related data.

Necessary Condition No. 4.3.2.4. The contractor shall distribute conference/meeting announcements and flyers to all those on the conference invitation list.

Necessary Condition No. 4.3.2.5. The contractor shall collect all conference/meeting fees and, when applicable, invoice any attendee for outstanding fees.

Necessary Condition No. 4.3.2.6. The contractor shall provide proceedings, office supplies, signs, and posters for conferences/meetings, and provide for transportation of those items to and from the conference or meeting.

Necessary Condition No. 4.3.2.7. The contractor shall staff the registration desk at conferences/meetings.

Necessary Condition No. 4.3.2.8. The contractor shall review invoices and itemize expenses at the end of each conference/meeting.

#### **4.4 Service Area – Records Management Support Services**

Performance Objective No. 4.4. The contractor shall provide records management and records storage support functions in compliance with NETL Order 243.2 Records Management Program, to include, but not be limited to, the following:

- a. Provide support for NETL's records management system, both electronic and paper-based, using appropriate quality controls to ensure accuracy in tracking storage locations, schedules, retrieval, timely disposition, and inventory of all NETL records. Provide support for the use of automated and manual records management systems to support the Records Management service area.
- b. Provide retention and retrieval services involving NETL's records holding area, maintaining control of inactive records boxes in the records holding area, and any other storage location used for records holding.
- c. Schedule and preserve all electronic, audiovisual, and micrographics records with inventories, required reports, and disposition authorities, as these programs are initialized and ongoing.
- d. Provide records management services with respect to environment, safety, and health records, in compliance with NETL Order 243.2 Records Management Program and NETL Order 243.1-1 ES&H Record Identification and Retention, by developing and maintaining a comprehensive filing system that merges both the DOE and contractor(s) ES&H files. This system shall ensure security of sensitive information and also ensure that privacy act provisions are met with respect to personnel medical files. A disposition schedule shall be developed and followed for sensitive and non-sensitive

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files. The contractor shall work closely with the ES&H Division to ensure that all DOE requirements are being met in the development of this comprehensive filing system.

Necessary Condition No. 4.4.1: The contractor shall:

- a. Perform an annual inventory (or more frequently if required by the NETL Records Officer) of all records boxes.
- b. Provide disposition reports for the Records Officer to submit to all NETL organizations having boxes eligible for destruction.
- c. Make all arrangements for appropriate disposition when scheduled criteria have been met or, when applicable, moving boxes to appropriate storage locations.
- d. Maintain an electronic database of record boxes shipped and retrieved from Federal Records Center and the National Archives and Records Administration.

Necessary Condition No. 4.4.2: The contractor shall assist the Records Officer in preparing and presenting annual records training for custodians.

Necessary Condition No. 4.4.3: The contractor shall reproduce any new records information for dissemination to all records custodians, as directed by the Records Officer.

Necessary Condition No. 4.4.4: The contractor shall update vital records in the Off-Site Emergency Records Center as necessary.

#### **4.5 Service Area – Communication Support Services**

The contractor shall provide the communication support services identified in the following sub-service areas.

##### **4.5.1 Sub-Service Area – *Graphics Support***

Performance Objective No. 4.5.1. The contractor shall provide graphics services for creating, merging, modifying, enhancing, converting, storing, retrieving, and publishing documents and periodicals for NETL. Support shall include, but not be limited to, the following:

- a. Provide electronic scanning/imaging services.
- b. Provide publications and presentation graphics support such as: infographics (charts, graphs, diagrams); presentation graphics (slides, view graphs, posters); illustrations and drawings (technical and illustrative); publication design and production (newsletters, brochures, pamphlets, factsheets, magazines, reports); topical reports; conference materials (announcements, programs, support materials); multimedia presentations; signs/posters; OCR image scaling; and file translation.

Necessary Condition No. 4.5.1: The contractor shall maintain hardware and software competency in the operation and maintenance of NETL graphics support systems and equipment, such as IBM compatible and Mac OS personal computers, optical scanners, communications devices, laser printers, color plotters, and other similar equipment.

#### **4.5.2 Sub-Service Area – *Photography Support***

Performance Objective No. 4.5.2. The contractor shall provide photography services. Services shall include, but not be limited to, the following:

- a. Provide studio and location photography on a scheduled and on-demand basis. These services will be provided primarily using digital equipment, but use of film equipment (35mm) may occasionally be required.
- b. Scan images for digital processing.

Necessary Condition No. 4.5.2.1: The contractor shall coordinate external processing and printing of film.

Necessary Condition No. 4.5.2.2: The contractor shall maintain files of negatives.

#### **4.5.3 Sub-Service Area – *Multimedia Support***

Performance Objective No. 4.5.3. The contractor shall provide multimedia services for kiosk presentations, videos, CD-ROM production, DVD production, and other media as needed. Services shall include, but not be limited to, the following:

- a. Provide product development support services, such as artistic design (including illustrations); hardware and software integration, development, and troubleshooting; video, audio, and graphics services; multimedia scripting and story boarding; video editing; and integration of photography, graphics, video, animation, and audio.

Provide production support services, such as designing CD cover materials; designing and installing install shield programs on CDs; burning CDs, and procuring and coordinating CD production.

- b. Produce NETL conference proceedings on CD-ROM.
- c. Operate the NETL Image Bank (electronic image library database) including photograph identification, cataloging, scanning/entry into the database, and maintenance of computer interface.
- d. Produce multimedia products, such as virtual site tours, DOE product line overviews, interactive exhibits, and other outreach products as requested.
- e. Design web pages, post material on web pages, and facilitate interactive web events and other information technology efforts internally for NETL.

Necessary Condition No. 4.5.3: The contractor shall provide guidance and assist on purchasing of multimedia equipment.

#### **4.5.4 Service Area – *Technical and Scientific Writing Support***

Performance Objective No. 4.5.4. The contractor shall provide technical and scientific writing services. Services shall include, but not be limited to, the following:

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- a. Write, proofread, and edit, scientific and technical materials aimed at various audiences with differing levels of understanding of the subject matter. Disseminate publications, reports, presentations, speeches, media releases, and other public information products. This support shall also include assembly of background information and graphics, editorial research, interviewing, layout, word processing, typesetting, and printing services.
- b. Provide support as Managing Editor of the NETL monthly newsletter. This support includes writing articles and compiling and distributing the newsletter.
- c. The contractor shall provide a science/energy/technology writer whose sole duty will be to support the Public Affairs Office in its mission to produce public communication products about technical subjects with the goal of increasing awareness of NETL and FE initiatives and programs. The writer will be responsible for researching subject matter and writing about policies, projects, and processes associated with science, energy, and technology for distribution to multiple audiences with differing levels of understanding of the subject matter. The writer will also be responsible for editing articles written by others, and will serve as a writing mentor/coach for other public affairs writers.

Necessary Condition No. 4.5.4.1: The contractor shall provide guidance and recommendations for equipment (hardware and software) that will serve to enhance the efficiency and capabilities of writers in producing technical and scientific communications products.

Necessary Condition No. 4.5.4.2: The contractor shall interact with appropriate external organizations to ensure the availability of NETL reports and other information for public access.

#### **4.6 Service Area – Library Support Services**

Performance Objective No. 4.6. The contractor shall maintain an NETL Technical Library. Library activities shall include, but not be limited to, the following:

- a. Acquire reference material regarding NETL's lead mission areas, as well as allied fields, including the acquisition of paper-based materials and subscriptions to electronic materials.
- b. Catalog, tag, and control the library collection of books, journals, periodicals, and magazines.
- c. Check out, check in, and account for the library inventory intended for circulation at NETL.
- d. Maintain a repository of all NETL contract and CRADA final reports and summaries; all technical papers published by NETL employees; and all patents issued to NETL employees; as well as any associated patent licenses.
- e. Perform literature and patent searches.
- f. Provide interlibrary services to the NETL and to external libraries.
- g. Provide support for the use of automated library or electronic document management systems and manual systems to support the library support service area.

#### **4.7 Service Area – Director’s Requirements**

The contractor shall develop and implement innovative approaches and adopt practices that foster continual improvement in accomplishing the mission of NETL and in providing quality support services to NETL.

Furthermore, the contractor shall use effective and efficient management structures, systems, and operations that are cost-effective while achieving and maintaining (1) high levels of quality and (2) a proactive ES&H culture in accomplishing NETL's mission. This proactive ES&H culture includes (1) the ability to apply DOE's Integrated Safety Management's (ISM) seven principles and five functions in planning, budgeting, executing, and improving its management and work activities, (2) the successful execution of requirements in the contractor's ISM plan, and (3) the continual improvement of NETL's environmental posture by using an environmental management system to manage environmental risk.

The contractor shall plan and execute work in such a manner that will foster the objective demonstration of competence in management areas such as (1) problem resolution, (2) coordination, (3) innovation, and (4) manpower management. In addition, the contractor shall conduct all work in a manner that continually improves productivity, minimizes waste, and complies with all applicable laws, regulations, and terms and conditions of the contract, including attaining the contract's socioeconomic goals.

#### **5.0 Notes/Guidance**

- a. See Performance Objective No. 4.1.1b. Data processing entry for the systems listed includes editing for completeness, verifying for validity, and entering the required forms/data into the system; establishing data editing and entry procedures, including rejection and correction steps; reviewing all data processing problems incurred and being responsible for follow-up and corrective actions; securing the interpretation and clarification of the information as requested by the preparers and users relevant to completion and submission of system data; generating correspondence for federal contact signature; and distributing reports and correspondence to POCs.
- b. See Performance Objective No. 4.1.1c. Historically, contractor receipt and distribution of incoming and outgoing correspondence has been accomplished only at the NETL PGH site.
- c. See Performance Objective No. 4.2.1. The clerical support functions may be redistributed within or among offices at the two NETL facilities on an as-needed basis.

## 6.0 Acronyms

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| a. AAD: Acquisition and Assistance Division                            | n. GPO: Government Printing Office                              |
| b. ARC: Albany Research Center   | o. HRD: Human Resources Division                                |
| c. ASAP: Automated Standard Application for Payments                   | p. ISM: Integrated Safety Management                            |
| d. BMIS: Fossil Energy Business Management Information System          | q. LAN: Local Area Network                                      |
| e. CHRIS: Corporate Human Resources Information System                 | r. MGN: Morgantown, West Virginia                               |
| f. COR: Contracting Officer's Representative                           | s. NETL: National Energy Technology Laboratory                  |
| g. CRADA: Cooperative Research and Development Agreement               | t. ORFSC: Oak Ridge Financial Service Center                    |
| h. DISCAS: Departmental Integrated Standardized Core Accounting System | u. PADS-Web: Procurement Automated Data System                  |
| i. DOE: Department of Energy   | v. PATS: Procurement Action Tracking System                     |
| j. ES&H: Environment, Safety, and Health                               | w. PGH: Pittsburgh, Pennsylvania                                |
| k. FE: Office of Fossil Energy   | x. POC: Point of Contact  |
| l. FITS: Federal Information Tracking System                           | y. PRATS: Procurement Request Authorization and Tracking System |
| m. FMD: Financial Management Division                                  | z. R&D: Research and Development                                |
|  | aa. SAS: Support Administrative Services                        |
|  | bb. USP: Unsolicited Proposal                                   |